How to Maximize the Benefits of Online Forms - Worksheet!

The webinar is designed specifically for the OMS practice by experts in the patient experience.

- Patient forms are a conversation. Each side of the conversation needs something from the other, and each side also needs to provide something.
- Online forms can help facilitate this conversation, on both sides.

Poll #1: How often do you get incomplete/incorrect information on your patients forms?

A. Infrequently	**B.** About half the time	**C.** Almost all the time

An overview of the different forms types:
- Paper forms: the norm for most of dentistry's history, using hard copy, printed out forms that are sent home with the patient and often need to be brought back
- PDF forms: customizable and can be deliverable by email, although often need to be printed off as hard copies
- Web forms: designed specifically for your practice by an in-house designer. Very customizable but can be inaccessible for smaller practices.
- Forms that are built into dental software: integrate with PMS and are often filled out chair-side
- Forms as a service: essentially, endlessly customizable. Easier to automate than other form types.

Poll #2: What kind of forms are you using?

A. Paper forms	**B.** PDF Forms	**C.** Web Forms
D. Forms that are built into dental software	**E.** Forms as a service	

The Forms Journey

1. Patient Intake & Medical History	Probably the most information heavy forms. Customize these as much as possible to both your patient and the appointment type! Remember to make some questions required and to provide lots of conditional questions so that the forms are not too long.
2. Wellness Screening	The questions you ask will be dependent on your regional restrictions. Include a link for your patient to reschedule their appointment, if they can't come in.
3. Patient Consent Forms	These include HIPAA consent and procedure consent forms. They do need to contain a conditional question where the patient can refuse consent.
4. Pre-Appointment Instructions	While these don't need to be returned to the practice, they are necessary to ensure the successful outcome of a procedure.

5. Post-Appointment Instructions	Work these into your messaging cadence - automation is a useful tool here!
6. Satisfaction Surveys	Your patients are experts in their own experience. Make sure to ask them about it! This can provide useful feedback for your practice, as well as give you an opportunity to ask for a social media review when they have positive feedback.

The Ideal Automation Sequence

1. Patient Intake Forms, Medical History, & HIPAA Consent	**1 week before consultation**
2. Pre-Appointment Instructions	**5 days before appointment + another reminder at 48 hrs.**
3. Wellness Screening	**24 hours before both consultation and appointment**
4. Procedure Consent	**24 hours before appointment**
5. Post-Appointment Instructions	**Sent same day as the procedure**
6. Satisfaction Survey	**Sent at the conclusion of the patient journey**

Sending the right message at the right time is essential!

Some benefits to online forms that we've seen at Intiveo:
- 70% form completion rate
- Decreased operational costs
- Increased time-savings
- Reduction in manual tasks
- Reduction in time spent on forms logistics
- Maximizing staff work time
- Improved accuracy

Safety & Security

- All software that handles PIH must be HIPAA and/or PIPEDA compliant, as well as compliant with regional security standards.
- But this is not actually what keeps information secure.
- Choose software with a strong digital security history.
- Looking for software companies with government contracts is a good bet, because they have to go above and beyond with security.

Check out the free templates from Intiveo!

Want to know more information? Reach out to us at info@intiveo.com or check out our website!

See you at the 2022 SOMSA Conference!